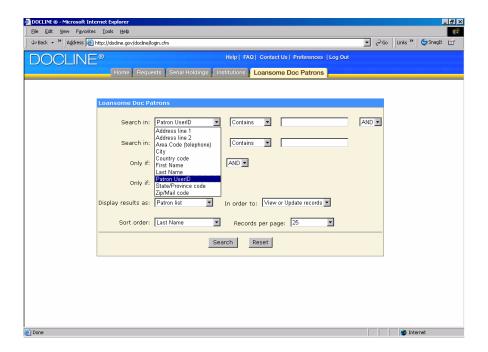## Section E.   Loansome Doc Patrons

Section E-1.   Search for LD Patrons at My Institution

DOCLINE libraries that provide Loansome Doc services to their patrons may click on the "Loansome Doc Patrons" tab from from the DOCLINE main menu to search for patron records at their institution.

As a participant in the Loansome Doc (LD) program, each library may only search for patrons who have registered with their library. Only NLM has the ability to view all registered Loansome Doc patrons.

The Loansome Doc Patrons search screen has **search** fields and **display** fields:

- Use the **search fields** to retrieve Loansome Doc Patron records.

- Use **display fields** to display the records in a specific format.

- The search screen provides two **"Search in:"** boxes and two **"Only if:"** boxes.

Section E-1. Search for LD Patrons at My Institution

The down arrow in the **Search in:** box to select from the following list of fields:
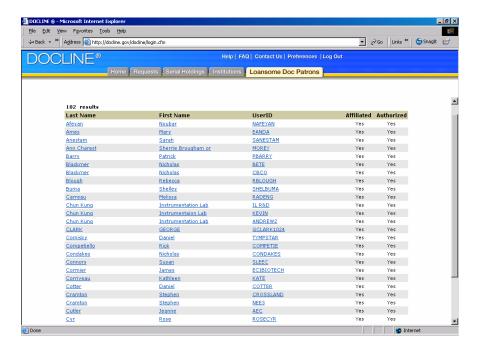- Address line 1
- Address line 2
- Area Code (telephone)
- City
- Country Code
- First name/Last name
- LIBID
- Patron User ID
- State/Province Code/Zip/Mail code

To further narrow a search, use one or both **"Only if:"** boxes, which include the following fields:
- Search all - (default)
- Affiliated - (LD patrons affiliated with the Ordering library)
- Authorized - (LD patrons authorized to use Ordering library)
- Forward to DOCLINE - (LD user authorizes Ordering library to forward request to DOCLINE)

 The Loansome Doc Patrons search results screen displays the results of the search with a count of the records retrieved in a pre-defined format:

- Records may be displayed in one of **three possible formats**.

- Records in any display may be **sorted** by one of eleven possible fields.

- The default display is **Patron List;** the default sort is **Last name**.

Section E-1. Search for LD Patrons at My Institution

A full patron record may be displayed by clicking on any one of the fields displayed in patron display.

The full patron record screen is labeled: **Update Patron Information**.

A full patron record includes the items listed below.

- Name and address (as the user entered it during LD registration)

- Phone

- Fax

- Email

- Delivery Method

- Forwarding

- Comment

- Affiliated Patron (library may update)

- Authorized Patron (library may update)

Note:

- Only those fields noted as "(library may update)" can be altered by the ordering library.

Section E-2. Loansome Doc Patron Categories

Affiliated Patron: A patron who has an affiliation with the library or organization that is providing the Loansome Doc service (e.g. the hospital staff --or-- physicians with hospital privileges.)

> The default setting is "Affiliated".
> - If checked, "Affiliated" will appear on the Loansome Doc receipt.
> - If not checked, "Unaffiliated" will appear on the Loansome Doc receipt.

Authorized Patron: Indicates that the patron is approved for Loansome Doc services at the specific institution. Each library has the ability to designate whether or not individual Loansome Doc users are authorized to route their requests to their institution.

- The default setting is "Authorized".

- If a library no longer wants to serve a patron, they should contact that person by telephone, email or in writing.

- Select the affiliated box on the Loansome Doc Patron screen to remove the check mark.

- Unauthorized users will not be able to make Loansome Doc requests to your library.

Note:

One or both categories may be selected as appropriate.

Section E-3.   Update a Patron's Record

- The Patron record is separated into two parts: **Display Only** and **Update**.

- The Loansome Doc library can **update** only the **Affiliated** and **Authorized** fields.
  Click **Update** at the bottom of the screen to save changes.

- Each patron is responsible for updating their own registration information from the "Loansome Doc Registration" Page in PubMed.

- To return to the Loansome Doc Patrons search results screen without making changes, click **Search Results** from the bottom of the "Update Patron Information" screen.

- The following display options are available to view Loansome Doc patron records:

  1. **Patron list - (default display)** This display is a list of patron records which meet the search criteria entered in the "Loansome Doc Patrons Search" screen. The Patron List display includes the following fields:

     Last Name - First Name |
     UserID
     Affiliated
     Authorized

  2. **Contact Information** - This display includes:

     Patron Name
     Phone
     Fax
     Email

  3. **Patron Address** - This display includes:

     Patron Name
     Patron Address

- From any display, patron records may be sorted by any one of the following fields:
     Address line 1
     Address line 2
     Area Code (telephone)
     City
     Country Code
     First name
     Last name
     LIBID
     Patron User ID
     State/Province Code
     Zip/Mail code

Section E-4.   Loansome Doc Passwords

Select the **PASSWORD** button at the bottom of the **Update Patron Information** screen to display the Loansome Doc patron's password: "And the answer is {PatronPassword}".

Section E-5.   Block a Patron's Loansome Doc Requests

Authorized Patron: Indicates that the patron is approved for Loansome Doc services at the specific institution. Each library has the ability to designate whether or not individual Loansome Doc users are authorized to route their requests to their institution. The default setting is authorized.

If a library no longer wants to serve a patron, they should contact that person by telephone, by e-mail, or in writing. Select the affiliated box on the Loansome Doc Patron screen to remove the check mark.

Unauthorized users will not be able to make Loansome Doc requests to your library.

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